

# Southwestern University

## **ALUMNI SELF-STUDY COMMISSION STRATEGIC RECOMMENDATIONS A PROGRESS REPORT**

Updated: December 2005

### ***Leadership and Facilities***

- Restructure governance to provide more opportunities for leadership
  - ✓ Created Implementation Steering Committee (ISC) to manage implementation of Self-Study Recommendations (May/June 2002)
  - ✓ Created new volunteer role – Alumni Chair of Homecoming (December 2002)
  - ✓ ISC appointed four task force teams to address specific Self-Study recommendations (January 2003)
  - ✓ Leadership Task Force finalized draft of a new Constitution & Bylaws which addresses recommendations about an Alumni Assembly and new volunteer roles (August 2003)
  - ✓ ISC edited draft of Constitution & Bylaws (December 2003)
  - ✓ ISC and Alumni Board endorsed proposed Constitution & Bylaws and sent it to the Board of Trustees for review (March 2004)
  - ✓ Board of Trustees endorsed proposed Constitution & Bylaws (March 2004)
  - ✓ Inducted Houston Association of Southwestern University Alumni officers (May 2004)
  - ✓ Began recruiting for Annual Giving Board (Summer 2004)
  - ✓ 529 members of the Association of Southwestern University Alumni voted on the proposed Constitution & Bylaws. The Constitution & Bylaws passed with 97.7% voting in favor. (January 2005)
  - ✓ Annual Giving Board held its first meeting (January 22, 2005)
  - ✓ Accepted nominations for Alumni Council and Assembly At-Large Delegates (February 2005-November 2005)
  - ✓ Trained alumni recruited to serve as officers for the Washington, D.C. Association of Southwestern University Alumni (September 2005)
  - ✓ The Nominations Committee for Alumni Leadership met to discuss the recommendations that were submitted by alumni and staff.

After reviewing more than 218 recommendations, decisions were made for a nominee and alternate for each of the Alumni Council positions and the 25 Assembly at Large positions. (December 2005)

Developing on-line form where alumni recommend themselves or others for volunteer roles

- Create stronger ties with the Board of Trustees
  - ✓ Board of Trustees approved changes in the University's Constitution & Bylaws to include Association President and President-Elect as ex officio members of the Board of Trustees and create permanent position on the University's Nominations Committee to be held by the Association President (November 2004)
  - ✓ University President sets date for mid-year Trustee retreat and symposium and plans for alumni leadership to attend along with Trustees (October 2005)
  
- Formally orient and train alumni leadership
  - ✓ Developed formal training program for reunion committees and class agents; workshops held in 2002, 2003, 2004, 2005 and 2006.
  - ✓ Developed training materials and held first local association officer training (July 2004)

Reunion and Class Agent Workshop will evolve into a leadership training weekend once other leadership roles have been established.
  
- Dedicate a facility for alumni
  - ✓ Construction began on a new Alumni Center (September 2002)
  - ✓ Alumni Center officially opened (March 2003)
  
- Establish a position for an Associate Vice President for Alumni Relations
  - ✓ Alumni Director promoted to Associate Vice President for Alumni Relations (August 2002)

## **Financial Investment in Programming and Staffing**

- Increase number of staff positions in alumni relations
  - ✓ Full-time secretary joined staff (previously a half-time position) (November 2002)
  - ✓ Hired new employee for newly created Assistant Director (December 2002)

- ☑ Increase funding for alumni programs
  - ✓ Campaign Committee approved a five-year budget for new alumni relations initiatives to be funded by the campaign
  
- ☑ Establish an Annual Fund Giving Board
  - ✓ Development staff proposed structure (August 2003)
  - ✓ Chairs recruited (August 2004)
  - ✓ Recruiting for volunteer positions began (Summer 2004)
  - ✓ First meeting held on January 22, 2005
  
- ☑ Include objectives related to the support of alumni programs in the comprehensive capital campaign
  - ✓ Campaign objectives included funding for the purchase/renovation of an alumni center

## **Programming**

- ☑ Ensure that programs support Southwestern's Core Values
  - ✓ Routinely evaluate programs to ensure that they adhere to core values and help advance the overall mission of the University
  
- ☑ Alumni programming should promote lifelong learning and a passion for intellectual and personal growth
  - ✓ Host book signings in the Alumni Center
  - ✓ Co-host alumni lecturers with academic departments
  - ✓ Host alumni presenters in Alumni Center
  - ✓ Re-instituted Road Scholars (taking faculty on the road) for local programming
  - ✓ Hold Alumni University during Homecoming
  - ✓ Promote alumni authors on [www.sugrads.org](http://www.sugrads.org)
  - ✓ Incorporated "What We're Reading" on [www.sugrads.org](http://www.sugrads.org)
  - ✓ Invite alumni to attend Shilling Lecture Series
  - ✓ Distinguished Alumnus event includes a lifelong learning component
  - ✓ Started hosting an alumni reception during Brown Symposium (February 2004)
  - ✓ Hosted first-ever Alumni Art Exhibit (October 2004)
  - ✓ Reserved a block of tickets for alumni to attend the Writer's Voice Series (September 2005)
  - ✓ Created a lifelong learning page on [www.sugrads.org](http://www.sugrads.org)
  - ✓ Held first alumni artist exhibit (solo show) in the Alumni Center (September 2005)

- Develop a program to involve alumni in mentoring students  
Task Force yet to be appointed and charged
- ☑ Integrate faculty into alumni activities and programs
  - ✓ Encouraged faculty to invite alumni lecturers to campus and offer to assist with travel/accommodation expenses (August 2004)
  - ✓ Faculty hosted reception for alumni artists (October 2004)
  - ✓ Invited faculty to teach courses during Alumni University
  - ✓ Re-instituted Road Scholars (taking faculty on the road) for local programming
- ☑ Enhance Homecoming and Reunions
  - ✓ Created positions for an alumnus/a and a student to co-chair the Homecoming Planning Committee
  - ✓ Class & Affinity Relations Task Force proposed that classes plan reunions to be held every five years with financial support from the University
  - ✓ Reunion Workshop moved to January to provide more lead time for reunion planning (January 2004)
- Leverage relationships with campus affinity groups
  - ✓ Class & Affinity Relations Task Force proposed a process that will allow affinity groups to formally affiliate with the Association of Southwestern University Alumni and thus gain a delegate position on the Assembly and other benefits  
Affinity groups will be invited to affiliate in 2006
- ☑ Establish local alumni associations
  - ✓ Launched Houston Association for Southwestern University (May 2004)
  - ✓ Trained officers for Washington, D.C. Association (September 2005)  
Officers being recruited for Dallas
- Establish an alumni class year system or structure
  - ✓ Class of 1953 elected class officers (October 2003)
  - ✓ Class of 2004 elected class officers (May 2004)
  - ✓ Met with Student Life staff to develop a process by which classes develop more affinity before graduating (April 2005)  
Student Life and Alumni Relations will recommend to newly-elected Alumni Council that the class representatives who are elected each academic year serve as Delegates on the Assembly. Class Officers

will be elected from the graduating class along with their Trustee representative starting in Spring 2006.

- Implement a plan to smooth transition from student to alumnus/a
  - ✓ An interdepartmental "Just for Seniors" committee formed to develop an integrated approach to supporting seniors in their final semesters (July 2005)
  - ✓ Office of Alumni Relations mailed "Just For Senior" packets to seniors with materials that guide them through senior year events and opportunities (August 2005)
  - ✓ Senior Fund Committee introduced new integrated program (September 2005)
  - ✓ Introduced Official Alumni Ring Program (October 2005)  
**Task Force yet to be appointed and charged**

## Communications

- ☑ Enhance on-line alumni community
  - ✓ Launched [www.sugrads.org](http://www.sugrads.org) (June 2003)
  - ✓ Launched online Class Notes (June 2003)
  - ✓ Introduced Alumni Profiles (June 2003)
  - ✓ Began updating alumni web site weekly (June 2003)
  - ✓ Introduced new on-line group utility for alumni committees to share information, conduct discussions, ask questions, and share documents (March 2005)
  
- Maintain connectivity through the alumni Web site
  - ✓ Included links to [www.sugrads.org](http://www.sugrads.org) in electronic issues of *News from SU* which are mailed monthly
  - ✓ Created on-line forms for alumni to update contact information
  - ✓ Created web pages for programs and events that provide information and on-line registration  
**Robust online directory scheduled to be launched in 2006**
  
- ☑ Give greater access to on-campus publications and news
  - ✓ Launched web-version of the [magazine](#) using flash technology (August 2003)
  - ✓ Megaphone began selling [subscriptions](#) (August 2004)

- Consider outsourcing the development, expansion and maintenance of the alumni on-line community
  - ✓ University signed contract with Dox Publishing for web development (December 2002)
  - ✓ University signed contract with Publishing Concepts Inc. for the production of an online alumni directory and online event registration (August 2004)
  
- Establish a Communications Advisory Group
  - Task Force yet to be appointed and charged

NOTE: When the Implementation Steering Committee first met, they proposed that all the Self-Study Recommendations be considered and, if viable, implemented in five years (April 2002-April 2007).